Supplemental Information Technology Services Procurement Procedures (MPA 230)

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Summary

The Division of Information Technology (DoIT) has recently reissued a Master Price Agreement for the procurement of Supplemental (staff augmentation) Information Technology Services (MPA 230).   This document outlines the current procedures for hiring vendors from the approved list.

Note that this is an interim procedure. The State is currently in the process of configuring BuySpeed for MPA 230 requisitions and designing an online system for competitive bidding.

Procedures
Step One: Agency Request

Project teams and / or operational managers interested in hiring supplemental information technology services should contact Laurie Scialabba, MPA Coordinator [401-222-5779 (voice) 401-222-4260 (fax) or MPAServices@DoIT.ri.gov (email)] to obtain a Supplemental Information Technology Services Request Form to initiate purchases, including change orders.   The MPA Coordinator will assign an application number to the form prior to sending it to the agency and will log all requests and correspondence relating to MPA 230.

Please note the following:

- **Required Fields** - The agency is responsible for filling out all un-shaded areas of the form. (Note that the accounting information should be filled out by the agency business office – by an authorized agent – see step 2)

- **Signatures** - Two signatures are required prior to submission to the agency Business Office:
  1. The Project Sponsor, a senior business officer of the sponsoring agency, according to the policies and procedures of that agency. This individual is responsible for approving the budget and the overall vendor performance of the engagement.
  2. IT Business Partner – responsible for ensuring that the engagement is properly planned, coordinated and managed according DoIT policies, procedures and standards. The Business Partner is responsible for initiating any required project approval activities, and ensuring that the form and supplemental documentation meets DoIT requirements. Business Partners

- **Role –** Requests must identify the Role(s) for individual contractors. Roles

- **Preferred Vendors** - Requestors may identify a preferred vendor or named individual. Any request for noncompetitive award(s) must be accompanied by a statement of justification as to why it is in the best interest of the state to award a noncompetitive contract.   All noncompetitive contract awards must be approved by the State CIO.

- **Estimated Hours** - Requests must provide an estimated number of hours for each role (type of service) requested.

- **Supplemental Documentation** - Requestors are encouraged to attach a detailed list of deliverables, scope of work statement, and other requirements. These documents may be required depending on the

size and complexity of the engagement. The Business partner will work with DoIT and the agency to determine the necessary depth of the supplemental request materials.

- **Engagement Type** - Requestors may identify their preferred engagement type; either hourly, hourly not to exceed (NTE) or fixed priced engagements. All NTE and fixed priced engagements must have clearly defined deliverables and a scope of work statement attached to the application. (Note: Either the project sponsor or Authorized Agent may request NTE or Fixed priced engagements but the final determination of the type of engagement will be made by the CIO based on the nature of the project and the result of negotiations with vendors.)

Step Two: Agency Business Office

The Supplemental Information Technology Services Request Form and any attached narrative document(s) should be forwarded to the agency Business Office where an Authorized Agent must sign and approve the request for services [. In addition, the Authorized Agent is responsible for:

1. Assuring that the appropriate account code combination exists in RISAIL. If not, it is the responsibility of the Authorized Agent to make sure the appropriate account code is added by contacting Accounts & Controls (Alicia Araujo 222-6407).   The account code combination must include Natural Account(s) 631520 (IT System Design Services) or 631530 (IT System Support Services). No purchase order release can be created without an appropriate account code combination.

    If funding is to be split among multiple accounts the Authorized Agent must identify the split(s).

2. Filling in any additional information required on the request form.

3. Forwarding the completed request form and any attachments to the Division of Information Technology. Requests should be emailed and a copy of the signature on the signed paper form should be faxed to Laurie Scialabba, MPA Coordinator, at 401-222-5779(voice), 401-222-4260 (fax) MPAServices@DoIT.ri.gov (email) or delivered to her at One Capitol Hill, fourth floor.

Step Three: Department of Administration Review and Approval

The MPA Coordinator will document the date the request was received, and forward to the MPA Administrator who will review the request for services and manage the vendor selection process.   The Administrator will update the log of status of all requests.

The MPA Administrator will facilitate the review and approval by the Budget Office for all requests over $5,000. The Budget Office will confirm that the appropriate codes have been assigned and that there is adequate funding in those accounts to cover the cost of the engagement.

DoIT approval will differ based on the estimated cost of the engagement and whether the work to be performed is a project or a supplement to ongoing operational activities.

- **Operational Support** - All requests for supplemental operational support services must be approved by the DoIT Operations Director, Jim Berard. This includes any engagement containing roles under the Systems Administration and Technical Support, Network Support and Desktop Support categories of service.

Operational requests for more than $200,000 must also be approved by the Chief Information Officer Tom Collins.

- **Project Support**. All requests for project support must be approved by the Chief Information Officer or his designee. Any project over 500 hours or $50,000 must also be approved by the Project Review Committee. (see: www.doit.ri.gov/committees.php)

The CIO or his designee will also review and approve or reject any requests for non-competitive awards.

The MPA Administrator will inform the agency team of the request's approval, denial or any qualifications on the approval.

If at any time there are any problems or questions on any of the information pertaining to the request, the MPA Administrator will notify and coordinate the resolution with the agency sponsoring team and copy the Business Partner on all correspondence.

Step Four: Vendor Selection

For competitive procurements, the MPA administrator will coordinate an email solicitation to qualified vendors. All official correspondence with the vendor (notices, proposal receipts, etc.) will be through and logged by Laurie Scialabba, the MPA Coordinator, under the direction of the MPA Administrator. Agency teams will be allowed to review correspondence and interview candidates. Agencies must provide MPA Coordinator with documentation of any correspondence, including interviews, phone calls or discussions with vendors throughout this process.

Vendors will base their proposals on the information that was submitted including the estimated number of hours required skills, roles, project scope, deliverables and any other supplemental project or engagement descriptions.

Selection steps:

A. **Preparing for Selection:** Prior to soliciting offers, the MPA Administrator will work with the Agency Sponsor and the DoIT Business partner to finalize the specific documents to be sent to vendors, terms, evaluation criteria and timing of the solicitation.

B. **Solicitation:** The MPA Coordinator will send the solicitation via email to all qualified vendors. The solicitation must include bid instructions and identify scoring criteria as required by law (RIGL 37-2-18).

C. **Vendor Response:** Vendors will submit their responses to the MPA Coordinator per the instructions in the solicitation. The MPA administrator will review, qualify and package the responses for the agency project team's review and scoring. Vendors must include specific names of individuals with their respective resumes and cost information in their response.

D. **Agency Ranking:** The sponsoring agency team will rank and identify their top 3 choices according to criteria specified in the original solicitation Agencies must save, and copy the MPA Coordinator on all correspondence with vendors.

E. **Negotiation of Scope with Vendors**: After notifying the MPA Administrator, the agency team may conduct interviews, and negotiate the scope of work with the top 3 vendors. Documentation of this correspondence must be provided to the MPA Coordinator.

F. **Negotiation of Price**: The MPA Administrator will coordinate notification (via email) of the top 3 vendors who have been selected for "best and final" solicitation. Instructions and scoring criteria must be included in accordance with State law ([RIGL 37-2-19](#)). The MPA Administrator will handle all communications and negotiate "best and final" pricing with the top 3 choices. The MPA Administrator will communicate the results of these responses with the sponsoring agency team, who will be copied on all correspondence.

G. **Vendor Selection:** The sponsoring agency team will notify the MPA Administrator of their recommendation of award to the final vendor, with specific named individuals via email (MPAServices@DoIT.ri.gov). All recommendations must be in writing and provide a summary of the evaluation criteria scoring as set forth in the solicitation.

H. **DoIT Approval of Vendor**: The MPA administrator will present the recommendation to the CIO, or designee, who will make the final decision on the award. Approval date will be logged by the MPA Coordinator.

I. **Engaging the Vendor:** The MPA Administrator will input the Master Blanket Purchase Order number onto the request form, and notify the Central Business Office to issue a purchase order release to the selected vendor. The CBO will send a copy of the PO Release to the MPA Coordinator, who will fax and forward the original copy to the vendor and with a copy to the requesting agency. The date of the PO release will be logged into the tracking spreadsheet.

Each PO Release must include the approved named individuals and rates. The "bill to" address will be the CBO. Upon receipt of the PO Release the Vendor should contact the Agency Project Contact Person to arrange for proceeding with the project.

Step Five: Vendor Invoicing

The agency sponsor and project team will be responsible for overseeing and accepting all deliverables and work of the contractor, in consultation with the Agency Business Partner.

Vendors must submit invoices with backup documentation for bills in the format established in the Master Price Agreement to Laurie Scialabba, MPA Coordinator, at 401-222-5779(voice), 401-222-4260 (fax) MPAServices@DoIT.ri.gov (email) or delivered to her at One Capitol Hill, fourth floor. The MPA Coordinator will date stamp all invoices and fax a copy to the agency for approval and acceptance. The project team and agency business office will be responsible for acceptance of work. The agency must fax a signed copy of the invoice marked approved back to the MPA Coordinator who will log date received and forward to the MPA Administrator for approval to pay. No invoice will be processed without the appropriate backup or if submitted more frequently than monthly or are otherwise not compliant with the invoicing instructions. The MPA Administrator will sign a copy of the invoice for approval to pay and log the date forwarded to the CBO who will record the receipt of services in BuySpeed and create an electronic invoice for payment. Upon approval from Louise Bright, CBO will forward the original invoice to Accounts & Control for payment. Once invoices are entered into the BuySpeed system payment status will be available on the RIPAY website (www.ripay.ri.gov).

Cancellations and Amendments

The Agency Business Office may request cancellation of or changes to a purchase order at any time by notifying the MPA Administrator in writing giving a reason for the change.   Amendments and cancellations will only be accepted according to the terms and conditions established for the Master Price Agreement with the Vendors.

Purchase orders with activity on them cannot be cancelled. They may be reduced and closed and a change order created and sent to the vendor with an explanation for the reduction.

All requests for cancellation or amendment will be logged into the tracking spreadsheet.

Use of Vendor List and Pricing by Others

Quasi-public agencies and municipalities may take advantage of the prices offered on the Master Price Agreement directly according to internal policies and procedures.

Related Documents

- Supplemental Information Technology Services Request Form | Word Document
- List of Roles | HTML
- List of Business Partner assignments | HTML
- Supplemental Terms and Conditions For MPA 230 | PDF File
- Invoicing Instructions for MPA 230 | HTML